Federal Procurement Data System (FPDS) System Administrator Training Manual

<u>Draft</u>

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1 Introduction

This training manual is designed to act as a guide for authorized Agency System Administrators who operate the System Administration function within the Federal Procurement Data System (FPDS). This manual is used in conjunction with the System Administrator Class. In addition to this training manual, further instruction is available via the following online tools:

- User Guide
- Help System
- Computer Based Training (CBT)

1.1 Manual Layout

This training manual provides how-to guides, exercises, and examples that describe FPDS System Administration functions and processes. As such, the training manual is a valuable resource tool for Agency trainers and other authorized users. System Administrator Class participants are encouraged to use this manual at their respective work locations as a reference and tool for Agency in-house training. Table 1 describes the training manual layout and design.

Table 1. Training Manual Structure

Manual Section	Section Purpose
Overview	Defines and explains the importance of each section.
How To	Provides answers to frequently asked questions with simple, easy to follow instructions.
Examples	Illustrates specific functions to provide understanding for section tasks.
Exercises	Exercises are used as a tool for class participants to gain hands on experience. The course exercises are discussed in class to measure and reinforce the participant's comprehension.
Review	Summarizes topics that allow participants to work independently and provides feedback that is used as a performance measurement for training.

2 Common System Features

2.1 Login screen

Agency System Administrators create User IDs and Passwords for their respective Agency. FPDS users are provided access to Awards, System Administration, and Report features associated with the system privileges and user types assigned. The user accesses an initial login screen and enters a User ID and Password.

2.2 Initial Login Screen

The Login screen, shown in Figure 1 is the initial login menu provided for FPDS users. To login FPDS, enter the User ID, Password, and then Click [Log In]. A successful login opens the Navigation screen shown in Figure 4.

Figure 1. General Login Screen

2.3 Incorrect Logins

If the user enters an incorrect password, the FPDS Login screen allows the User three attempts to enter the correct password. After the first failed login attempt the message Forgot Your Password? is displayed on the screen under the Login Button.

2.4   Forgotten Password

If the user has forgotten his/her password, the password can be recovered by following the Forgot Your Password? link. This will display the screen shown in Figure 2. The user enters his/her User ID, and then clicks Submit. The User's email address is stored in the User Management system and is associated with the User ID. Once the User ID has been submitted, the Forgotten Password feature will email the user a new login password.

Figure 2. Forgot Password Notification Screen

2.5 Expired Login Session

After a period of inactivity, approximately 30 minutes, FPDS will automatically end the user's session. If the user needs to restart the session, a second login screen is provided. When the session expires, the screen last used is displayed for user interaction. This will prompt the Expired Login screen illustrated in Figure 3. The user must re-enter his/her User Name and Password, and then click ⬚Login . FPDS opens to the Navigational screen.

Figure 3. Expired Login Screen

2.6 Navigation Screen

The FPDS Navigation screen shown in Figure 4 is organized in five sections. Each section contains a list of tasks related to the section. Each task links to a specific web-based form on which users enter and submit data.

Figure 4. Navigation Screen

2.7 Web Form Toolbar

Search functions are available throughout the System Administration section in FPDS. These functions are used to access Users, Locations, Organizations, Service Classifications, etc. A standard toolbar, similar to the one depicted in Figure 5, is available for each web form. For example, the toolbar displayed below is located at the top of the Users screen.

Figure 5. User Management Standard Toolbar

The toolbar shown in Figure 6 is located at the bottom of Locations, Organizations, and Service Classifications maintenance screens.
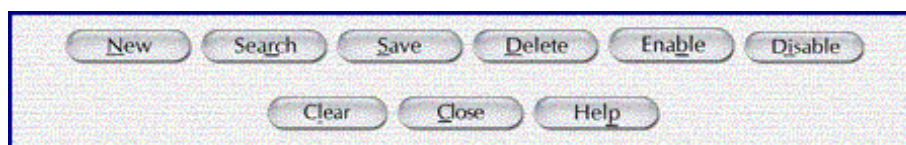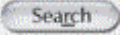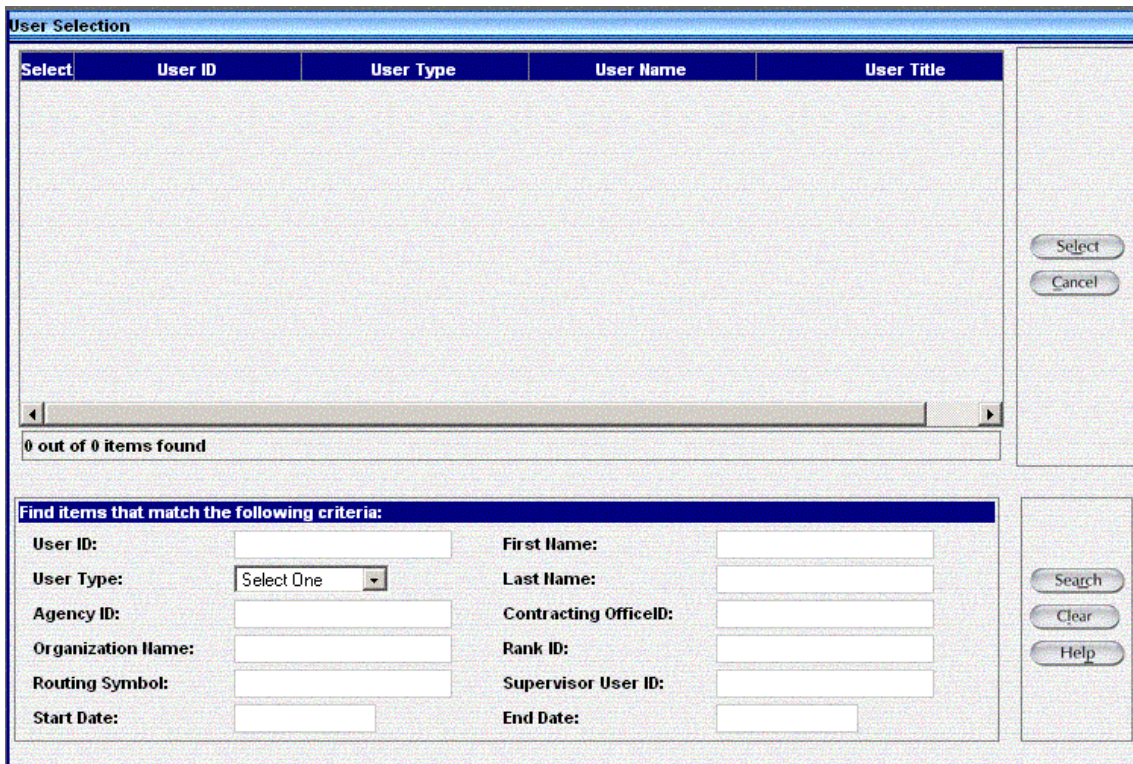

Figure 6. Standard Toolbar for Maintenance Screens

2.8   Search Function

One feature common to most web forms in FPDS is the Search function. For example, to search for Users in the web forms, click on (Search) located on the standard toolbar Figure 5. The Search function is available for all System Administration tasks.

Using the Search Function

1.   From the Navigation screen, under System Administration, select [icon] .
2.   Select (Search) located at the top of the User Management screen on the standard toolbar.
3.   The User Selection screen is displayed, as shown in Figure 7.
4.   In the User ID field, located in the lower left corner of the screen, type in a User ID.
5.   Select (Search) located in the lower right corner of the screen.

Figure 7. User Selection Screen

6. The search criteria information generates the User(s) in the User Selection Screen, shown in Figure 8.

Figure 8. User Selection Defined

7. To select the appropriate user, click the radio button located in the Select column shown in Figure 8.

8. After selecting the user, click located in the right top corner, to open the user selection information.

    Quick Tip: To search the list of Users without using a criteria selection, leave all fields blank in the Find Matching Items Criteria list, shown at the bottom of Figure 8, *then click* Search *. When the matching criteria fields are empty, the generated list contains a larger selection of users.*

    Note: Due to the volume of data in FPDS the larger selection list is limited to a portion of the data available, such as the first 200 records. It is recommended that you always enter search criteria to narrow the selection when possible.

2.9 Exercise: Login Screen General-Function

2.9.1 Login to FPDS

The Login Screen shown in Figure 9 is used to sign in to FPDS. To begin the course exercises, follow the steps below and login to FPDS.

1. To open FPDS go to www.fpds.gov and enter the following information to display the Navigational Screen.
   - ➢ Login: Enter Classuser001.
   - ➢ Password: Enter changeme.
   - ➢ Select [Log In] to display the Navigational Screen in FPDS.

Figure 9. FPDS Login Screen

3 System Administration

System Administration is accessed via the Navigation screen of the FPDS system shown in Figure 10. The System Administration module allows the Agency System Administrator to add and modify system user accounts and data submission. System Administration is divided into the following four administrative tasks.

- Users
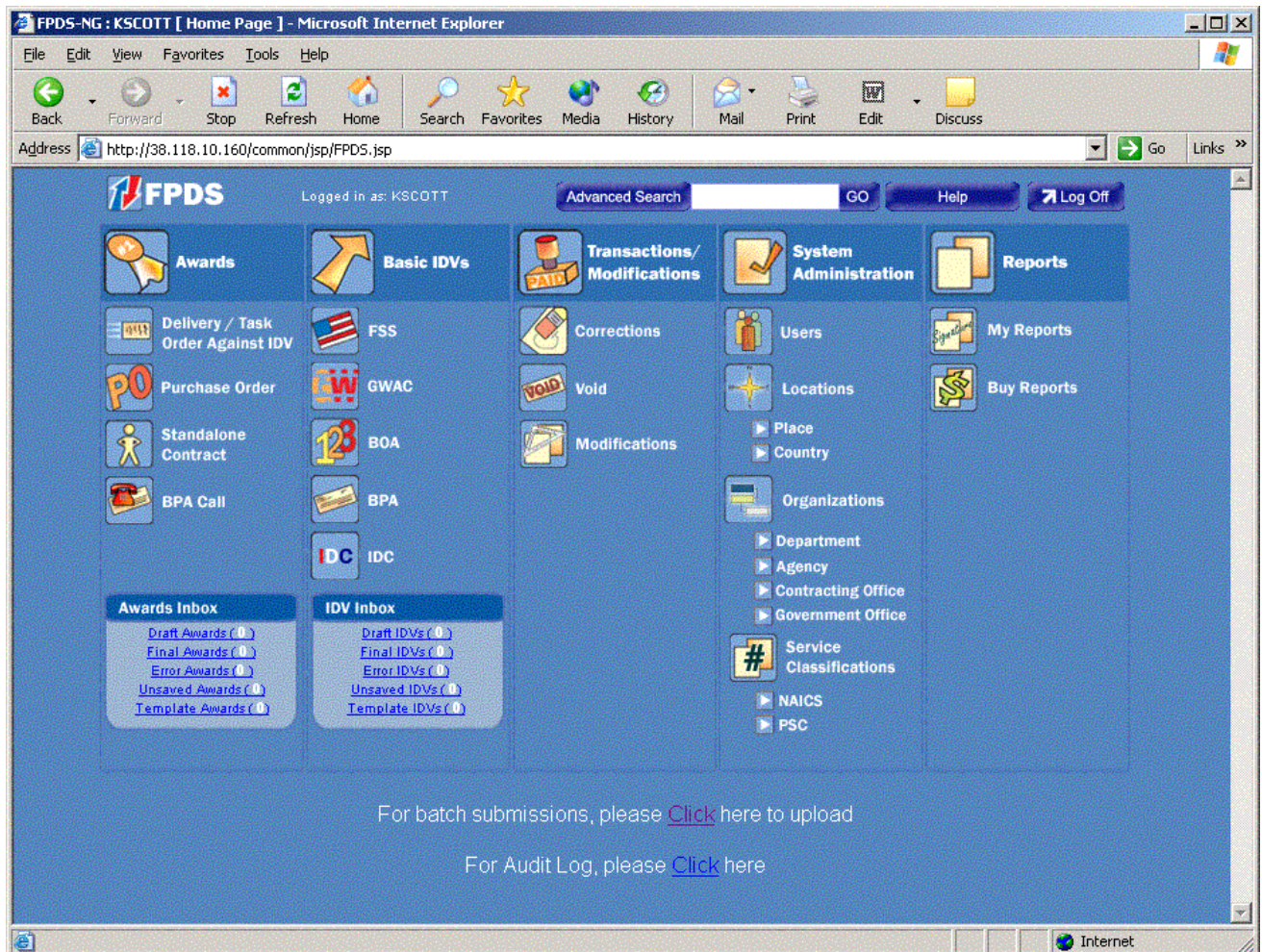- Locations
- Organizations
- Service Classifications

Figure 10. FPDS Navigation Screen

4   Organizations

The Organizations task allows System Administrators to create and organize information associated with the Agency and its user profiles. The Organizations task consists of two levels:

- Contracting Office
- Government Office

4.1   Contracting Office

The Contracting Office Screen, shown in Figure 11, allows the System Administrator to designate Agency Contracting Office profiles for award batch processing. The Contracting Office Maintenance screen is used to create, update, and delete Contracting Offices.
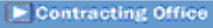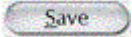
Figure 11. Contracting Office Screen

4.1.1   How to Find, Add, and Modify a Contracting Office

Find a Contracting Office:

1. From the Navigation screen, under System Administration, select [▶ Contracting Office].
2. Select [Search] located at the bottom of the Contracting Office Maintenance screen on the standard toolbar.
3. FPDS displays the Contracting Office Selection Screen.
4. In the Office Name field, located at the bottom of the screen, type an Office Name.
5. Select [Search] located in the lower right corner of the screen.
6. The search criteria information generates the Contracting Office information in Contracting Office selection.
7. To select the Contracting Office, click the radio button [⊙] located in the Select One field.
8. Select [Select] located in the upper right corner, to open the Contracting Office Selection information.

Add a Contracting Office
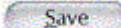
1. From the Navigation screen, under System Administration, select ▶ Contracting Office .
2. Enter the Office ID, and Office Name.
3. Enter the Agency ID associated with this office. The system automatically fills in the Agency Name field after the Agency ID field is completed.
4. Enter a Region Code for the location of this office.
5. Enter a Start Date.
6. Leave the End Date field blank. Entering a date in the End Date field will disable the Contracting Office when the date is current.
7. Enter the street address for the Contracting Office in address 1. Address 2 and 3 are used for a PO Box, suite, or other types.
8. Enter the Country Code. The system automatically completes the country name after the country code has been entered.
9. Enter the City, State, and Zip Code for the Contracting Office.
10. Select Save to save the changes for the Contracting Office account.

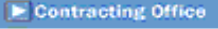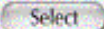Delete a Contracting Office
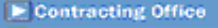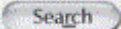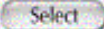
1. From the Navigation screen, under System Administration, select ▶ Contracting Office .
2. Select Search located at the bottom of the Contracting Office Maintenance screen on the standard toolbar.
3. FPDS displays the Contracting Office Selection Screen.
4. In the Office Name field, located at the bottom of the screen, type the Office Name that will be deleted.
5. Select Search located in the lower right corner of the screen.
6. The search criteria information generates the Contracting Office information in Contracting Office selection.
7. To select the Contracting Office, click the radio button ⊙ located in the Select One field.
8. Select Select located in the upper right corner, to open the Contracting Office Selection information.
9. Select Delete to remove the Contracting Office from the database.
10. The message Contracting Office Successfully deleted will be displayed at the top of the Screen
11. Select Close to return to the main Navigation Screen.

Quick Tip. *When an office that is selected for deletion is on an Award the message Cannot delete the record, the office code has been referred by Award will be displayed. To change the ability to use this office in FPDS, use the disable feature.*

Disable a Contracting Office

1. From the Navigation screen, select [► Contracting Office] .
2. Select [Search] located at the bottom of the Contracting Office Maintenance Screen on the standard toolbar.
3. FPDS will display the Contracting Office Selection Screen.
4. In the Contracting Office Name field, located in the lower right corner of the screen, enter the Contracting Office Name that will be disabled.
5. Select [Search] located in the lower right corner of the screen.
6. The search criteria information generates the Contracting Office information in Contracting Office Selection.
7. To select the Contracting Office, click the Radio Button [⊙] located in the Select One field.
8. Select [Select] located in the upper right corner, to open the Contracting Office Selection information.
9. FPDS will display the selected information in the Contracting Maintenance Screen.
10. Select [Disable] at the bottom of the screen.
11. The message Office Successfully Disabled will be displayed at the top of the screen.
12. Select [Save] to save the changes for the Contracting Office account.
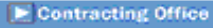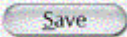
Enable a Contracting Office

1. From the Navigation screen, select [► Contracting Office] .
2. Select [Search] located at the bottom of the Contracting Office Maintenance Screen on the standard toolbar.
3. FPDS will display the Contracting Office Selection Screen.
4. In the Contracting Office Name field, located in the lower right corner of the screen, enter a Contracting Office Name or leave the fields blank.
5. Select [Search] located in the lower right corner of the screen.
6. The search criteria information generates the information in Contracting Office Selection.
7. To select the Contracting Office, click the Radio Button [⊙] located in the Select One field.
8. Select [Select] located in the upper right corner, to open the Contracting Office Selection information.
9. After selecting the disabled Contracting Office, click [Enable] at the bottom of the screen.
10. The message Office Successfully Enabled will be displayed at the top of the screen.
11. Select [Close] to return to the main Navigation Screen.

4.2   Exercise: Organizations - Contracting Office

4.2.1 Add a Contracting Office

This exercise demonstrates how to create a Contracting Office for your Agency. The Contracting Office name is a primary Key and cannot be duplicated. To create a unique Contracting Office and avoid duplication you will add your initials when entering information in some fields. You will need to enter the information in each field as directed by the steps listed below.

1. From the Navigation Screen under System Administration, select ▶ Contracting Office .
2. Enter the following Contracting Office information.
    ➢ Office ID: Enter "890 and your initials" without spacing in the Office ID field.
    ➢ Office Name: Enter "Class Contracting and your initials" for the Agency's Contracting Office Name.
    ➢ Agency ID: Select ⊡ and enter "American" in the Agency Name field.
    ➢ Region Code: Enter "01" for the geographical region for this office.
    ➢ Start Date: Leave the default of today's date (mm/dd/yyyy).
    ➢ End Date: Leave this field blank. Entering a date in the End Date field will disable the Contracting Office when the date is current.
    ➢ Enter "2100 Shore Pines Road" for the Address 1 field. Address 2 and 3 are used for PO Box, Suite, or other types.
    ➢ Country Code: Enter "USA" for the Country 3-digit code. The Country Name is system filled.
    ➢ City: Enter "Washington" as the City for the Contracting Office.
    ➢ State: Enter "DC" as the state for the Contracting Office.
    ➢ Zip Code: Enter "20014" as the Zip Code for the Contracting Office.
    ➢ Select Save to save the new Contracting Office account.
    ➢ Select Close to return to the Navigational Screen.

4.2.2 Find a Contracting Office
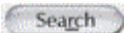
This exercise provides instructions on finding an existing Contracting Office. You will use the system search features to locate an existing Contracting Offices. Follow the instructions below and locate the Contracting Office List.
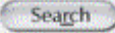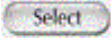
1. From the Navigation Screen under System Administration, select ▶ Contracting Office .
    ➢ Select Search located at the bottom of the Contracting Office Maintenance Screen on the standard toolbar.
    ➢ FPDS will display the Contracting Office Selection Screen.
    ➢ In the Office Name field, located at the bottom right corner of the screen, enter "Virginia" in the Office Name field.
    ➢ Select Search located in the lower right corner of the screen.
    ➢ The search criteria information generates the information in Contracting Office selection.
    ➢ Select "Virginia Contracting Activity" (Office ID ZD50) for the Contracting Office.
    ➢ Select the Radio Button ⊙ located in the Select One field.

➢ Select Select located in the upper right corner, to open the Contracting Office selection information.

➢ FPDS will display the selected information in the Contracting Maintenance Screen.

➢ Select Close to return to the Navigational Screen.

4.2.3 Disable a Contracting Office

This exercise demonstrates disabling a Contracting Office. A Contracting Office will not be deleted if the Office ID is on an Award. To restrict the use of a Contracting Office change the status of the Office by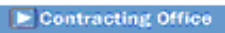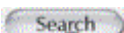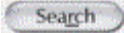 using the disable feature. Follow the directions and change the status of the Contracting Office you added in exercise 4.2.1.

1. From the Navigation Screen, select ▶ Contracting Office .

    ➢ Select Search located at the bottom of the Contracting Office Maintenance Screen on the standard toolbar.

    ➢ FPDS will display the Contracting Office Selection Screen.

    ➢ In the Contracting Office Name field, located in the lower right corner of the screen, enter the Contracting Office Name you created in section 4.2.1.

    ➢ Select Search located in the lower right corner of the screen.

    ➢ The search criteria information generates the Contracting Office information in Contracting Office Selection.

    ➢ To select the Contracting Office, click the Radio Button located in the Select One field.

    ➢ Select Select located in the upper right corner, to open the Contracting Office Selection information.

    ➢ FPDS will display the selected information in the Contracting Maintenance Screen.

    ➢ Select Disable at the bottom of the screen.

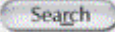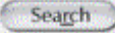   ➢ The message Office Successfully Disabled will be displayed at the top of the screen.

4.2.4 Enable a Contracting Office

The Contracting Office you previously added needs to be enabled. This exercise demonstrates how to change the status to enable the use of this Contracting Office. To change the status, under organizations locate Contracting Office and follow the steps below.

1. From the Navigation Screen, select ▶ Contracting Office .

    ➢ Select Search located at the bottom of the Contracting Office Maintenance Screen on the standard toolbar.

    ➢ FPDS will display the Contracting Office Selection Screen.

    ➢ Enter the Contracting Office Name in the Contracting Office Name field.

    ➢ Select Search located in the lower right corner of the screen.

    ➢ The search criteria information generates the information in Contracting Office Selection.

    ➢ To select the Contracting Office, click the Radio Button located in the Select One field.

    ➢ Select Select located in the upper right corner, to open the Contracting Office Selection information.

    ➢ Select Enable at the bottom of the screen.

    ➢ The message Office Successfully Enabled will be displayed at the top of the screen.

    ➢ Select Close to return to the main Navigation Screen.

4.2.5 Delete a Contracting Office

This exercise demonstrates deleting a Contracting Office. The Contracting Office can be deleted if the Office is not referenced on an Award document. Follow the steps below to delete a Contracting Office.

1. From the Navigation Screen under System Administration, select [▶ Contracting Office].

    ➢ Select [Search] located at the bottom of the Contracting Office Maintenance Screen on the standard toolbar.

    ➢ FPDS will display the Contracting Office Selection Screen.

    ➢ In the Office Name field, located at the bottom of the screen, enter the Office Name you created in section 4.2.1.

    ➢ Select [Search] located in the lower right corner of the screen.

    ➢ The search criteria information generates the information in Contracting Office selection.

    ➢ To select the Contracting Office, click the Radio Button [●] located in the Select One field.

    ➢ Select [Select] located in the upper right corner, to open the Contracting Office selection information.

    ➢ Select [Delete] to remove the Contracting Office from the database.

    ➢ Select [Close] to return to the main Navigation Screen.

4.3 Government Office

The Government Office Screen, shown in Figure 12, is used to track contract awards for offices that are not established as a Contracting Office. The Maintenance screen is used to create, update, and delete Government Offices.
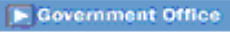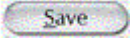

Figure 12. Government Office Screen
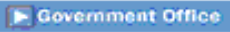
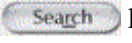### 4.3.1 How to Find, Add, and Modify a Government Office

Find a Government Office

1. From the Navigation screen, under System Administration, select `▶ Government Office` .
2. Select `Search` located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
3. This will open the Government Office Selection Screen.
4. In the Office Name field, located at the bottom of the screen, type an Office Name.
5. Select `Search` located in the lower right corner of the screen.
6. The search criteria information generates the Government Office information in the Government Office Selection Screen.
7. To select the Government Office, click the Radio Button `⊙` located in the Select One field.
8. Select `Select` located in the upper right corner, to open the Government Office selection information.

Add a Government Office

1. From the Navigation screen, under System Administration, select ▶ Government Office .

2. Enter the Office ID, and Office Name.

3. Enter the Agency ID associated with this office. The system enters the Agency Name field after the Agency ID field is completed.

4. Enter a Region Code for the location of this office.

5. Enter a Start Date.

6. Leave the End Date field blank. Entering a date in the End Date field will disable the Government Office when the date is current.

7. Enter the street address for the Government Office in address 1. Address 2 and 3 are used for PO Box, suite, etc.

8. Enter the Country Code. The system enters the Country Name field after the Country Code field is completed.

9. Enter the City, State, and Zip Code for the Government Office.

10. Select Save to save the changes for the Government Office account.

Delete a Contracting Office

1. From the Navigation screen, under System Administration, select ▶ Government Office .

2. Select Search located at the bottom of the Government Office Maintenance Screen on the standard toolbar.

3. This will open the Government Office Selection Screen.

4. In the Office Name field, located at the bottom of the screen, type an Office Name.

5. Select Search located in the lower right corner of the screen.

6. The search criteria information generates the Government Office information in the Government Office Selection Screen.

7. To select the Government Office, click the Radio Button ⊙ located in the Select One field.

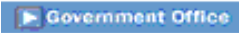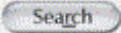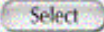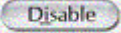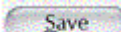8. Select Select located in the upper right corner, to open the Government Office selection information.

9. Select Delete to remove the Government Office from the database.

Disable a Government Office

1. To disable a Government Office, on the Navigation Screen, select [▶ Government Office] .
2. Select [Search] located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
3. This will open the Government Office Selection Screen.
4. In the Office Name field, located at the bottom of the screen, type an Office Name.
5. Select [Search] located in the lower right corner of the screen.
6. The search criteria information generates the Government Office information in the Government Office Selection Screen.
7. To select the Government Office, click the Radio Button [⦿] located in the Select One field.
8. Select [Select] located in the upper right corner, to open the Government Office selection information.
9. Select [Disable] at the bottom of the screen.
10. Select [Save] to save the changes for the Government Office account.

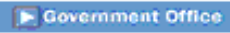Enable a Government Office

1. From the Navigation Screen, select [▶ Government Office] .
2. Select [Search] located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
3. This will open the Government Office Selection Screen.
4. In the Office Name field, located at the bottom of the screen, type an Office Name.
5. Select [Search] located in the lower right corner of the screen.
6. The search criteria information generates the Government Office information in the Government Office Selection Screen.
7. To select the Government Office, click the Radio Button [⦿] located in the Select One field.
8. Select [Select] located in the upper right corner, to open the Government Office selection information.
9. After selecting the disabled Government Office, click [Enable] at the bottom of the screen.
10. Select [Save] to save the changes for the Government Office account.

4.4 Exercise: Organizations – Government Office

4.4.1 Add a Government Office

This exercise demonstrates how to add a Government Office for your Agency. The Government Office name is a primary Key and cannot be duplicated. To create a unique Government Office and avoid duplication you will add your initials when entering information in some fields. Enter the information in each field as directed by the steps listed below.

1. From the Navigation Screen under System Administration, Select [Government Office] .
2. Enter the following Government Office information.

   ➢ Office ID: Enter "1252 and your initials" (without spaces) in the Office ID field.
   ➢ Office Name: Enter "Class Gov and your initials" for the Agency's Contracting Office Name.
   ➢ Agency ID: Use the Lookup Button [⋯] to search for "American Battle Monuments" (Agency ID 7400).
   ➢ Agency Name: Enter "American" in the Agency Name field and click [Search] .
   ➢ When you have located the Agency ID 7400 use the Radio Button [◉] and click [Select] to display this Agency.
   ➢ Region Code: Enter "09" for the geographical region for this office.
   ➢ Start Date: Leave the default of today's date (mm/dd/yyyy).
   ➢ End Date: Leave this field blank**.** Entering a date in the End Date field will disable the Government Office when the date is current.
   ➢ Enter "8901 Meeting Street" for the street in the Address 1 field. Address 2 and 3 are used for PO Box, Suite, or other types.
   ➢ Country Code: Enter "USA" for the Country 3-digit code. The Country Name is system filled.
   ➢ City: Enter "Washington" as the City for the Contracting Office.
   ➢ State: Enter "DC" as the state for the Contracting Office.
   ➢ Zip Code: Enter "20013" as the Zip Code for the Contracting Office.
   ➢ Select [Save] to save the new Contracting Office account.
   ➢ Select [Close] to return to the main Navigation Screen.

4.4.2 Find a Government Office

This exercise provides instructions on finding an existing Government Office. You will use the system search features to locate an existing Government Offices. Follow the instructions below and locate the Government Office List.
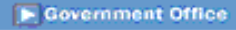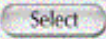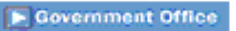
1. From the Navigation Screen under System Administration, Select [► Government Office] .

   ➢ Select [Search] located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
   ➢ FPDS will display the Government Office Selection Screen.
   ➢ In the Office Name field, located at the bottom of the screen, enter "Joint Task".
   ➢ Select [Search] located in the lower right corner of the screen.
   ➢ The search criteria information generates the information in Government Office selection.
   ➢ Select the Radio Button [⊙] located in the Select One field to select "Joint Task Force Brovo" (Office ID BR09) for the Government Office.
   ➢ Select [Select] located in the upper right corner, to open the Government Office selection information.
   ➢ FPDS will display the selected information in Government Maintenance Screen.

4.4.3 Disable a Government Office

This exercise demonstrates how to disable a Government Office. A Government Office will not be deleted if the Office ID is on an Award. To restrict the use of a Government Office change the status of the Office by using the disable feature. Follow the directions and change the status of the Government Office you added in exercise 4.4.1.

1. From the Navigation Screen, Select [► Government Office] .

   ➢ Select [Search] located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
   ➢ FPDS will display the Government Office Selection Screen.
   ➢ In the Government Office Name field, located in the lower right corner of the screen, enter the Government Office Name you created in section 4.4.1.
   ➢ Select [Search] located in the lower right corner of the screen.
   ➢ The search criteria information generates the information in Government Office Selection.
   ➢ To select the Government Office, click the Radio Button [⊙] located in the Select One field.
   ➢ Select [Select] located in the upper right corner, to open the Government Office Selection information.
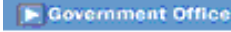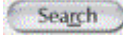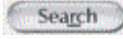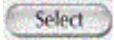   ➢ FPDS will display the selected information in the Government Maintenance Screen.
   ➢ Select [Disable] at the bottom of the screen.
   ➢ The message Office Successfully Disabled will be displayed at the top of the screen.
   ➢ Select [Close] to return to the main Navigation Screen.

4.4.4 Enable a Government Office

The Government Office previously added needs to be enabled. This exercise demonstrates how to change the status enabling the use of this Government Office. To change the status, under organizations locate Government Office and follow the steps below.

1. From the Navigation Screen, Select [Government Office] .
   - ➢ Select [Search] located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
   - ➢ FPDS will display the Government Office Selection Screen.
   - ➢ In the Government Office Name field, located in the lower right corner of the Screen, enter a Government Office Name or leave the fields blank.
   - ➢ Select [Search] located in the lower right corner of the screen.
   - ➢ The search criteria information generates the information in Government Office Selection.
   - ➢ To select the Government Office, click the Radio Button [⦿] located in the Select One field.
   - ➢ Select [Select] located in the upper right corner, to open the Government Office Selection information.
   - ➢ Select [Enable] at the bottom of the screen.
   - ➢ The message Office Successfully Enabled will be displayed at the top of the screen.
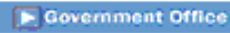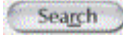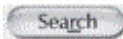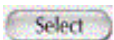   - ➢ Select [Close] to return to the main Navigation Screen.

4.4.5 Delete a Government Office

This exercise demonstrates how to delete a Government Office. The Government Office can be deleted if the Office is not referenced on an Award document. Follow the steps below to delete a Government Office.

1. From the Navigation Screen under System Administration, Select [Government Office] .
   - ➢ Select [Search] located at the bottom of the Government Office Maintenance Screen on the standard toolbar.
   - ➢ FPDS will display the Government Office Selection Screen.
   - ➢ Office Name: Enter the Office Name you created in section 4.4.1.
   - ➢ Select [Search] located in the lower right corner of the screen.
   - ➢ The search criterion generates the information in the Government Office selection window.
   - ➢ To select the Government Office, click the Radio Button [⦿] located in the Select One field.
   - ➢ Select [Select] located in the upper right corner, to open the Government Office selection information.
   - ➢ Select [Delete] to remove the Government Office from the database.
   - ➢ Select [Close] to return to the main Navigation Screen.

5 User Management

The User Management screen shown in Figure 13, allows the Agency System Administrator to create, update, and enable/disable Agency Users. Agency System Administrators have the ability to read/write to their respective Agency User's Profiles, and assign User Privileges.

Figure 13. User Management Screen

5.1   General Functions: User Types

Users are defined in three categories as shown in Table 2. Agency System Administrators create, control, and monitor their respective Agency Users Accounts. Government Agency Users are created as a Gov User Type. All other User Types are created, controlled, and monitored through FPDS System Administrator.

Table 2. User Types Descriptions

User Types	Definition	Security access
Sys User	System User Interface	Establishes a link between contract writing systems and FPDS.
Gov User	Agency personnel	Rights limited to user functions only, controlled by the Agency System Administrator.
Public User	All non-agency users	Reporting features only, controlled by the Agency System Administrator.

5.1.1 How to Find, Add, and Modify User Accounts

Find a User

1. From the Navigation screen, under System Administration, select [icon] .
2. Select [Search] located in the toolbar at the top of the User Management screen.
3. FPDS displays the User Selection screen.
4. In the User ID field, enter the name of the user you wish to locate, and then click [Search] .
5. A list of users is displayed based on the search criteria you entered.
6. To select the user from the list, click the Radio Button [radio] located in the Select One field.
7. Select [Select] to open the user selection information.

Add a Government User

1. From the Navigation screen, under System Administration, select [icon] .
2. The User Management screen displays a web-based form ready for the new User Information.
3. Under Select a User Type, Gov User is the default User Type.
4. FPDS displays a User Information screen that coincides with the User Type selected. In Figure 14, the information screen is for a Government User. Figure 14 compares the User Information section for a Public User and a Government User.
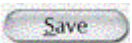

Figure 14. Government User Type

5. Enter the User Information in the fields provided.
6. Determine whether the user has the right to login to the web interface by placing a check in the Is Logon User checkbox.

   Note: If the Is Logon User box is not checked ☑ *, the user will not be able to login to the web interface.*
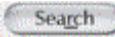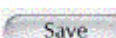
7. Enter Personal Information in the fields provided.
8. Determine whether the user should receive email notifications by placing a check in the Email Notification checkbox.

   Note: If the Receive Email Notification box is not checked ☑ *, the user will not receive notification on batch transactions or forgotten passwords.*

9. Enter the appropriate Government User Information in the fields provided.
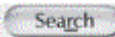10. Select [Save] to save the account.

Disable a User

1. From the Navigation screen select [icon].
2. Select [Search] located in the toolbar at the top of the User Management screen.
3. FPDS displays the User Selection screen.
4. In the User ID field, enter the name of the user you wish to locate, and then click [Search].
5. A list of users is displayed based on the search criteria you entered.
6. To select the user from the list, click the Radio Button [icon] located in the Select One field.
7. Select [Select] to open the user selection information that will be disabled.
8. Select [Disable] at the top of the User Management screen.
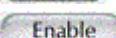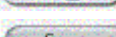9. Select [Save] to save the changes to the account.

Enable a User

1. From the Navigation screen, select [icon].
2. Select [Search] located in the toolbar at the top of the User Management screen.
3. FPDS displays the User Selection screen.
4. In the User ID field, enter the name of the user you wish to locate, and then click [Search].
5. A list of users is displayed based on the search criteria you entered.
6. To select the user from the list, click the Radio Button [icon] located in the Select One field.
7. Select [Select] to open the user selection information that will be enabled.
8. Select [Enable] at the top of the User Management screen.
9. Select [Save] to save the changes to the account.

5.2 User Privileges

User Privileges are located in the User Management screen. The Available and Current User Privileges are shown below in Figure 15. Available Privileges are defined as rights the System Administrator can give the user. Current Privileges are defined as rights the user has currently. This section defines User Privileges and provides directions for modifying these privileges.
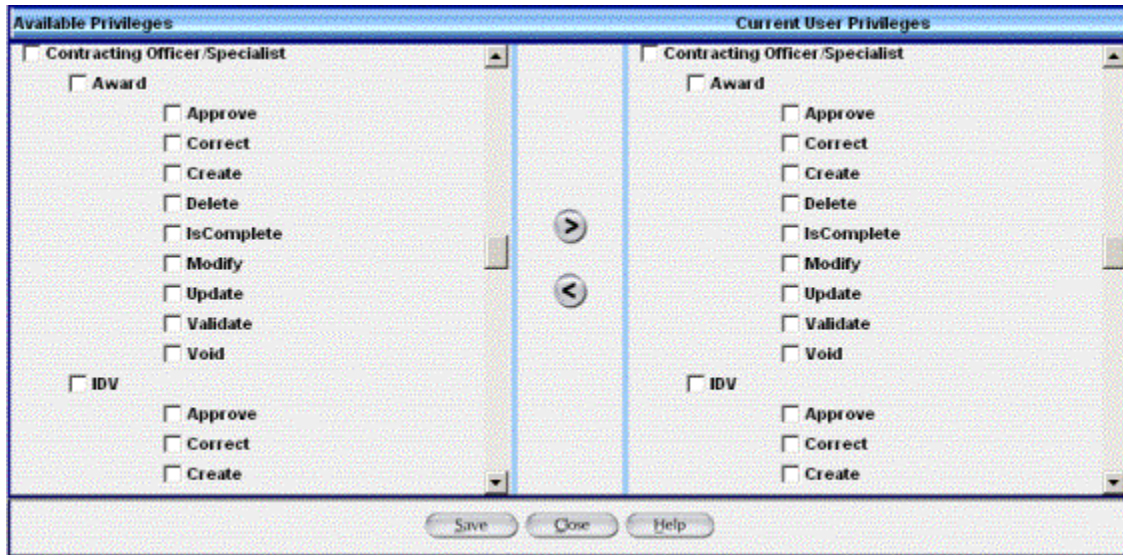
Figure 15. Available and Current User Privileges Screen

5.3 Available and Current Privileges

The selections in Available and Current Privileges are designated for the Contracting Officer or Agency personnel that function in this capacity. These privileges allow modifications of the IDV (Indefinite Delivery Vehicle) and Award documents.

5.3.1 How to Add and Modify User Privileges

Add User Privilege

1. To add User Privileges, on the Navigation screen select   .
2. Select Search located in the toolbar at the top of the User Management screen.
3. FPDS displays the User Selection screen.
4. In the User ID field, enter the name of the user you wish to locate, and then click Search .
5. A list of users is displayed based on the search criteria you entered.
6. To select the user from the list, click the Radio Button   located in the Select One field.
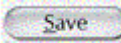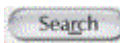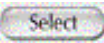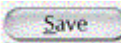7. Select Select to open the user selection information that will be modified.
8. To modify the privileges for the selected user, click User Priv .
9. To add an Available Privilege to the selected user's Current Privileges, select it from the Available Privileges list.
10. Select the Directional Arrow   the selected privilege is added to the user's Current Privileges list.
11. Select Save to save the changes to the user account.

Remove User Privilege

1. To remove User Privileges, on the Navigation screen select   .
2. Select Search located in the toolbar at the top of the User Management screen.
3. FPDS displays the User Selection screen.
4. In the User ID field, enter the name of the user you wish to locate, and then click Search .
5. A list of users is displayed based on the search criteria you entered.
6. To select the user from the list, click the Radio Button   located in the Select One field.
7. Select Select to open the user selection information that will be modified.
8. To modify the privileges for the selected user, click User Priv .
9. To remove a privilege from the selected User's Current Privileges, select it from the Current Privileges list.
10. Select the Directional Arrow   .
11. The selected privilege is removed from the user's Current Privileges list.
12. Select Save to save the changes to the user account.

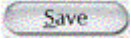## 5.4 **Exercise: Users – General Functions**

5.4.1 Add a Government User

This exercise provides instructions for creating a Government User Account. To create the new account you will add yourself. You will need to enter your personal information in each field as directed by the steps listed below.
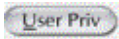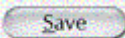
1. From the Navigation Screen under System Administration, select [icon] .
   - ➢ To create a new User Account, click (New) located on the standard toolbar. A new web-form is displayed for data entry.
   - ➢ Select a User Type: The system defaults to Gov User.
2. Enter the User Information for the new account.
   - ➢ User ID: Enter a User ID using your "first initial and last name" without any spaces.

     Example: *EJones*
   - ➢ Password: Enter a password you will remember. The password must have at least 6 characters, is case sensitive, and can be alphanumerical.

     Example: changeME39
   - ➢ Confirm Password: Re-enter your password for confirmation.
   - ➢ Start Date: The Start Date field is populated with today's date. Leave this date field with the default.
   - ➢ End Date: Leave this field blank. Entering an End Date will disable the user when the date is current.
   - ➢ Is Logon User: This field defaults with a check. Do not change the default setting.

     Note: *If the Is Logon User box is not checked ☑ , the user will not be able to login to the web interface for FPDS.*
3. Enter Personal Information for the user.
   - ➢ First Name/Initial: Enter your "first name or initial" in this field.
   - ➢ Middle Name/Initial: Enter your "middle name or initial" in this field. This field is optional.
   - ➢ Last Name: Enter your "last name or initial" in this field.
   - ➢ Phone No: Enter "703-555-5000".
   - ➢ Phone Ext: Enter "2532".
   - ➢ Fax: Enter "703-555-8700".
   - ➢ Email Address: Enter "your email address". This address is used by FPDS to send FPDS information to the user via email (e.g., batch processing information, forgotten passwords, etc.).

     Example: classuser@gce2000.com
   - ➢ Receive Email Notification: This field defaults with a check. Do not change the default setting.

     Note: *If the Receive Email Notification box is not checked ☑ , the user will not receive notification on batch transactions or forgotten passwords.*
   - ➢ Title: Enter "your Agency Title" in this field.

     Example: Contracting Officer

4. Enter the Government User Information.

   ➢ Agency ID: Enter "97AS" in the Agency ID field, or click the Lookup Button 〔⋯〕 to select an existing ID.

   ➢ Contracting Office ID: Enter "0001" in the Contracting Office ID field, or click the Lookup Button 〔⋯〕 to select an existing ID.

   ➢ Rank ID: Enter "Rank ID" if applicable to you. This field is for Military personnel only.

   ➢ Routing Symbol: Enter "UVF". This field represents an internal routing system for sending information to offices within an Agency.

   ➢ Room No: "102".

   ➢ Supervisor ID: Enter "classuser001", or click the Lookup Button 〔⋯〕 to select an existing Supervisor ID.

   ➢ After entering the Government User Information and data in all required fields are completed, click 〔 Save 〕 to save the new User Account.

   ➢ The User Management Screen displays the message User Successfully created under the toolbar located at the top of the screen.
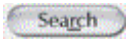
5.4.2 Add User Privileges

This exercise demonstrates how to add, and modify User Privileges. Initially New User Accounts are created without privileges in FPDS. The user you just created in Exercise 5.4.1 will need rights added to the Current Privilege List. Follow the steps below to assign User Privileges for the new User.

1. To add Privileges for a new or existing user, click ⬚User Priv located on the standard toolbar.

    ➢ Available Privileges: Select the Contracting Office Specialist by placing a ☑ in the checkbox provided.

    ➢ After selecting Contracting Office Specialist click the Directional Arrow ⟩ to add these privileges to the Current Privileges List. The User selection is applied to the Current User Privileges List.

    ➢ Select ⬚Save located at the bottom of the screen. The message User Privileges Successfully Updated displays at the top of the screen.

2. Follow the steps below to login to FPDS with the new User you created and verify the privileges assigned.

    ➢ Select ⬚Close located at the bottom of the screen to return to User Management.

    ➢ Select ⬚Log Off located at the top right corner of the User Management Screen.

    ➢ The Log off Button will take you to the FPDS Login Screen.

    ➢ Sign in with the new User ID and Password.

    ➢ FPDS displays the Navigational Screen with the new User Profile.

    ➢ You should only have rights for the User's task in the Awards section of FPDS. The System Administration task will not be available.

    ➢ Try to access Place or Country under the Locations task. You will not have privileges for this section of FPDS.

    ➢ Log off FPDS to change User Profiles. Click ⬚Log Off located at the top of the screen.

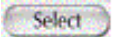   ➢ Sign back in with the Test User you where assigned in Section 2.9.1 and login to FPDS.

5.4.3 Find a User

This exercise demonstrates how to find existing User Accounts. The instructions will guide you through the process of using the system search features. To complete this task, follow the instructions listed below.

1. From the Navigation Screen under System Administration, select ⬚ .

    ➢ Select ⬚Search located in the toolbar at the top of the User Management Screen.

    ➢ FPDS displays the User Selection Screen.

    ➢ Select ⬚Clear to eliminate the information in the User Criteria Fields.

    ➢ Enter the User Name created in Section 5.4.1 in the User ID field.

    ➢ Select ⬚Search located in the lower right corner of the screen.

    ➢ A list of users is displayed based on the search criteria you entered.

    ➢ If more than one account is displayed in the User Selection field, click the Radio Button ⬚ next to the User Id you want to select.

    ➢ Select ⬚Select to open the User Selection information.

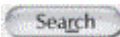   ➢ FPDS displays the User Management Screen with the User information selected.

5.4.4 Disable Users

This exercise demonstrates disabling a User account. A User cannot be deleted in FPDS. To disallow access for a user, you must disable the User profile. Follow the directions below to change the status of the User ID you added in section 5.4.1.

1. From the Navigation Screen under System Administration, select [image] .
   - ➢ Select [Search] located in the toolbar at the top of the User Management Screen.
   - ➢ FPDS displays the User Selection Screen.
   - ➢ Select [Clear] to eliminate the information in the User Criteria Fields.
   - ➢ In the User ID field, enter the User Name you created in Section 5.4.1 and click [Search].
   - ➢ A list of Users is displayed based on the search criteria entered.
   - ➢ To select the User, click the Radio Button [⊙] located in the Select One field.
   - ➢ Select [Select] to open the User Selection information.
   - ➢ Select [Disable] at the top of the screen.
   - ➢ The User Management Screen will display the message User Successfully Disabled.

5.4.5 Enable Users

The User ID you previously added has a disabled user profile status. To Enable the User, sign in to FPDS using the User ID originally given to you at the begging of class. After signing in you will need to find, and Enable the User Account. This exercise demonstrates how to Enable the user's ability to access FPDS.

1. From the Navigation Screen under System Administration, Select [image] .
   - ➢ Select [Search] located in the toolbar at the top of the User Management Screen.
   - ➢ FPDS displays the User Selection Screen.
   - ➢ In the User ID field, enter the User Name you disabled in section 5.4.4, and then click [Search].
   - ➢ A list of Users is displayed based on the search criteria entered.
   - ➢ To select the User, click the Radio Button [⊙] located in the Select One field.
   - ➢ Select [Select] to open the User Selection information.
   - ➢ Select [Enable] at the top of the User Management Screen.
   - ➢ The User Management Screen will display the message User Successfully Enabled.